Join the discussion @ p2p.wrox.com

Wrox Programmer to Programmer™

Beginning SharePoint® 2013 Building Business Solutions

Amanda Perran, Shane Perran, Jennifer Mason, Laura Rogers

BEGINNING SHAREPOINT® 2013: BUILDING BUSINESS SOLUTIONS

INTRODUCTION . . . . . **xxv**

CHAPTER 1 Understanding SharePoint 1
CHAPTER 2 Working with List Apps 21
CHAPTER 3 Working with Library Apps 55
CHAPTER 4 Managing and Customizing Lists and Libraries 85
CHAPTER 5 Working with Workflows 129
CHAPTER 6 Working with Content Types 161
CHAPTER 7 Working with Web Parts 197
CHAPTER 8 Working with Sites 227
CHAPTER 9 Managing Permissions 263
CHAPTER 10 Working with Business Intelligence 291
CHAPTER 11 Working with Social Features 355
CHAPTER 12 Managing Forms 387
CHAPTER 13 Working with Access Services 431
CHAPTER 14 Branding and the User Experience 463
CHAPTER 15 Getting Started with Web Content Management 485
CHAPTER 16 Managing Records 517
CHAPTER 17 Working with Search 557
CHAPTER 18 Building Solutions in SharePoint 585
APPENDIX A Installing SharePoint Server 2013 599
APPENDIX B Exercise Solutions 605

INDEX **617**

BEGINNING

SharePoint® 2013

BEGINNING

SharePoint® 2013

BUILDING BUSINESS SOLUTIONS

Amanda Perran
Shane Perran
Jennifer Mason
Laura Rogers

John Wiley & Sons, Inc.

Beginning SharePoint® 2013: Building Business Solutions

Published by
John Wiley & Sons, Inc.
10475 Crosspoint Boulevard
Indianapolis, IN 46256
www.wiley.com

Copyright © 2013 by John Wiley & Sons, Inc., Indianapolis, Indiana

Published simultaneously in Canada

ISBN: 978-1-118-49589-6
ISBN: 978--1118-49587-2 (ebk)
ISBN: 978-1-118-65491-0 (ebk)
ISBN: 978-1-118-65502-3 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at http://www.wiley.com/go/permissions.

Limit of Liability/Disclaimer of Warranty: The publisher and the author make no representations or warranties with respect to the accuracy or completeness of the contents of this work and specifically disclaim all warranties, including without limitation warranties of fitness for a particular purpose. No warranty may be created or extended by sales or promotional materials. The advice and strategies contained herein may not be suitable for every situation. This work is sold with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If professional assistance is required, the services of a competent professional person should be sought. Neither the publisher nor the author shall be liable for damages arising herefrom. The fact that an organization or Web site is referred to in this work as a citation and/or a potential source of further information does not mean that the author or the publisher endorses the information the organization or Web site may provide or recommendations it may make. Further, readers should be aware that Internet Web sites listed in this work may have changed or disappeared between when this work was written and when it is read.

For general information on our other products and services please contact our Customer Care Department within the United States at (877) 762-2974, outside the United States at (317) 572-3993 or fax (317) 572-4002.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at http://booksupport.wiley.com. For more information about Wiley products, visit www.wiley.com.

Library of Congress Control Number: 2012954767

Trademarks: Wiley, the Wiley logo, Wrox, the Wrox logo, Wrox Programmer to Programmer, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates, in the United States and other countries, and may not be used without written permission. SharePoint is a registered trademark of Microsoft Corporation. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc., is not associated with any product or vendor mentioned in this book.

For Dylan. May you stay forever young!

—Amanda and Shane

For the wonderful team at Battelle that helped me get started so many years ago. Cathy, Diana, and Jane, I couldn't imagine getting my start on a better team!

—Jennifer

For all of my girls; you are growing up to be such smart and amazing little ladies. Thank you for being so sweet and loving. You inspire me every day.

—Laura

ABOUT THE AUTHORS

AMANDA PERRAN is a seven-time recipient of the Microsoft Most Valuable Professional for Microsoft SharePoint Server, located in St. John's, Newfoundland and Labrador. She has been working as a consultant and trainer with SharePoint for more than 10 years. Amanda is a regular speaker and presenter at user group meetings, webcasts, and conferences, on topics such as Information Architecture, Enterprise Content Management and Governance. She is the co-founder of SharePoint Nation (`www.sharepointnation.org`), a virtual user group for SharePoint. You can follow her on Twitter as `@amandaperran` or visit her weblog at `www.sharepointmentors.com`.

SHANE PERRAN is a five-time recipient of the Microsoft Most Valuable Professional for Microsoft SharePoint Server, located in St. John's, Newfoundland and Labrador. He has been designing online user experiences for more than 15 years. His strong passion for visual presentation, web standards, and usability has paved the way for a successful transition into the SharePoint Products and Technologies space, where, over the past 10 years, Shane has become highly involved and focused in the SharePoint customization space. He is the co-founder of SharePoint Nation (`www.sharepointnation.org`), a virtual user group for SharePoint. Shane's SharePoint Customization Blog (`www.graphicalwonder.com`) is a popular stop for customization enthusiasts across the globe. You can follow Shane on Twitter as `@shaneperran`.

JENNIFER MASON, as a SharePoint Server MVP, has spent the last several years consulting others on best practices for implementing business solutions using SharePoint technologies. She is passionate about SharePoint and loves using out-of-the-box features to bring immediate ROI to her clients. She has worked with a range of companies, leading teams responsible for the design, implantation, and maintenance of SharePoint environments. When she isn't riding the slide at her new company, Rackspace Hosting, Jennifer focuses on strategy, planning, governance, and sharing her knowledge with the SharePoint community. After a recent move to the Lone Star State from Ohio, where she was a founding member of the Columbus, Ohio SharePoint Users Group, Jennifer is learning how to be a true Texan, cowboy boots and all.

You can learn more about Jennifer by viewing her blog at `http://sharepoint911.com/blogs/jennifer`. You can follow Jennifer on Twitter as `@jennifermason`.

LAURA DERBES ROGERS is a Senior SharePoint Consultant at Rackspace Hosting, and a Microsoft MVP. Her background is in server administration. She has been working with SharePoint implementations, training, customization, and administration since 2004. Her focus is on making the most of SharePoint's out-of-the-box capabilities without writing code. She works extensively with automating business processes with SharePoint Designer workflows and forms. Laura is a regular speaker at several different SharePoint conferences and loves sharing ideas on her blog at `www.wonderlaura.com`. A graduate of Louisiana State University, Laura currently resides in Birmingham, Alabama with her husband and two daughters. You can follow Laura on Twitter as `@WonderLaura`.

ABOUT THE TECHNICAL EDITORS

JAVIER BARRERA is a SharePoint Engineer at Rackspace (USA), a premier service leader focusing on a business class audience. He is the Senior Lead Engineer who serves as an architect and administrator to hundreds of enterprise-level SharePoint farms. Javier has delivered more than 30 presentations at SharePoint-focused events, and authored numerous blogs and articles. He is a contributing author to the forthcoming *Professional SharePoint 2013 Administration*. Javier, his beautiful wife, Roxanne, and three children live in San Antonio, Texas. His speaking engagement information and writing references are available at `http://JavierBarrera.com`.

COREY BURKE is a SharePoint Architect at Rackspace (UK). Corey has designed and built farms of more than 100,000 users and uses his experience to give back to the community. He is also a contributing author for *Professional SharePoint 2013 Administration*.

CREDITS

Acquisitions Editor
Mary James

Project Editor
John Sleeva

Technical Editors
Javier Barrera
Corey Burke

Production Editor
Christine Mugnolo

Copy Editor
Kim Cofer

Editorial Manager
Mary Beth Wakefield

Freelancer Editorial Manager
Rosemarie Graham

Associate Director of Marketing
David Mayhew

Marketing Manager
Ashley Zurcher

Business Manager
Amy Knies

Production Manager
Tim Tate

Vice President and Executive Group Publisher
Richard Swadley

Vice President and Executive Publisher
Neil Edde

Associate Publisher
Jim Minatel

Project Coordinator, Cover
Katie Crocker

Proofreader
Nancy Carrasco

Indexer
Robert Swanson

Cover Designer
Elizabeth Brooks

Cover Image
© Anthia Cumming / iStockphoto

ACKNOWLEDGMENTS

IT IS COMMON FOR AUTHORS to thank their spouses or partners for their understanding and support during the book-writing process. In our case, this was a project by a husband-and-wife team, which meant that the late nights, deadlines, and missed holidays were spent together, side by side, for better or worse. Of course, we would have it no other way.

We would like to thank our families for their love, support, and encouragement throughout this book and all the other challenges and surprises that life can bring.

It is an honor and a pleasure to share a title with talented professionals such as Laura and Jennifer. Thank you again for your excellent work on this book.

As always, we would like to thank Jim Minatel for introducing us to the Wrox team so many years ago. Thank you to Mary E. James for leading this project and for helping us get focused very early in the game. Thank you to John Sleeva for your excellent professionalism and support. It was an extreme pleasure to work with you on this project and we hope our paths cross again. Thank you Javier Barrera, Corey Burke, and Kim Cofer for your diligence and attention to detail throughout the editing process. Each of your talents contributed significantly to this project and we are so very grateful to each of you.

Finally, to Dylan. We would especially like to thank you for providing an excellent source of motivation and perspective during the entire process. Everything we do and experience in life is made so much better because of you. You are a light like no other.

—Amanda and Shane

WRITING TECHNICAL BOOKS is one of the things that I consider a huge blessing to be able to do. So many people along the way have helped get me to a point where this is possible. It would be impossible to thank them all by name, but it is important to call out some that have specifically helped me with this project.

Cathy, Diane, and Jane, who would have thought that hiring an intern would be such an adventure? I think back very often on the crazy times we had and am thankful that I was able to get my start with such a wonderful team. The time I spent with you was rich in learning and more fun than anyone should have at work! I think of you ladies often and credit many of my successes today on the investments you made in me. I am truly thankful and blessed for the time I was able to work with you!

When Amanda and Shane asked Laura and me to join this project a few years ago, little did I realize the changes it would have on my career. This is one of my proudest accomplishments, and I am so happy to be able to work on such a great team of people! Shane, Amanda, and Laura, I appreciate the long hours and the sacrifices you have put into this project. I couldn't ask for a better team to work with!

To the team at Wrox, especially Mary James and John Sleeva, thank you for all the hard work and effort you put into polishing this work and making it ready for print. I know you have quite a task when you have to deal with authors, and I appreciate all that you do.

Javier Barrera and Corey Burke, thanks so much for all the technical editing you did for this book. Your dedication and hard work has made for a better book. I am lucky to have you two as coworkers and thankful for the fanatical investment you have made for this book.

Jeff DeVerter, this year has been full of changes, and I am thankful for all you have done for me as I have transitioned into my new role at Rackspace. I consider myself lucky to have you as a manager, and this project definitely wouldn't have been possible without you helping me clear my schedule and make time for me to dedicate to the project.

Finally, I want to thank the SharePoint community, without whom none of this would be possible. I appreciate the time we get to spend together, and I consider so many of you close friends. I look forward to a future of learning more things together!

—Jennifer

WORKING ON THIS BOOK has been quite an experience, and there are several people who I would like to thank. The major influencers in my life exist on both the personal and the professional sides.

First, my husband, Chris, has been wonderful and supportive. His sarcasm and wit have always kept me laughing despite any book-deadline stresses. Speaking of family, I thank my daughters, who are growing up to be so intelligent, lovely, and poised. Also, thanks to my parents and my brother for being such a supportive family.

Thanks to Jennifer Mason and to Shane and Amanda Perran for being so inspiring to work with. I really have enjoyed being a part of this endeavor with all of you. You are outstanding and inspiring, and I look forward to working with you in many future endeavors.

Of course, I would also like to extend my thanks to the Wrox team, especially Mary James and John Sleeva. It has been more than a pleasure working with you on this book. You have been wonderful, professional, and patient, and I sincerely hope that we cross paths again soon.

Lastly, I would like to thank those of you who have been a major part of my path as a SharePoint professional: Shane Young, Todd Klindt, Bill English, Brett Lonsdale, Mark Miller, and Lori Gowin. Thanks to all my colleagues at Rackspace. You are like family to me, and I truly enjoy working with you every day.

—Laura

CONTENTS

INTRODUCTION *xxv*

CHAPTER 1: UNDERSTANDING SHAREPOINT **1**

Understanding Portals **1**
What Is Portal Technology? 2
Why Do Organizations Invest in Portal Technologies? 3
What Is SharePoint? **3**
Comparing Different SharePoint Versions **5**
SharePoint Foundation 5
SharePoint Server 8
Choosing between Foundation and Server 11
Options for Office 365 12
SharePoint Components Overview **12**
The Ribbon 13
List Applications 13
Library Applications 14
Web Parts 14
Workflows 15
Content Types 15
Sites, Workspaces, and Site Collections 16
Summary **18**

CHAPTER 2: WORKING WITH LIST APPS **21**

Understanding List Elements **21**
Discovering SharePoint List Column Types **22**
Understanding the Standard List Apps **24**
The Contacts List App 27
The Announcements List App 28
The Tasks List App 29
The Issues Tracking List App 31
The Calendar List App 32
The Links List App 34
The Discussion Board List App 34
The Survey List App 36
The Status List App 37
The External List App 37

Working with Lists **38**
Working with List Content 38
Summary **51**

CHAPTER 3: WORKING WITH LIBRARY APPS **55**

Understanding Libraries and Documents **56**
Creating and Managing Documents in a Library 57
Updating and Sharing Documents 64
Review Document Version History 71
Understanding SharePoint Library Templates **74**
Document Libraries 75
Form Libraries 77
Wiki Page Libraries 77
Picture Libraries 81
Data Connection Libraries 82
Summary **83**

CHAPTER 4: MANAGING AND CUSTOMIZING LISTS AND LIBRARIES **85**

Creating an Environment That Reflects Your Business **86**
Best Practices for Building a Dynamic System for Managing Content **87**
Start with the Users 87
Select the Best Tool 87
Plan for the Future 88
Working with Columns **88**
Types of Columns 90
Configuring Column Ordering 101
Choosing a Column's Scope 103
Creating and Customizing Views **107**
Working with the Standard View 108
Setting Up a Gantt, Calendar, or Datasheet View 112
List and Library Settings **116**
General Settings 117
Permissions and Management 120
Communications 121
Summary **126**

CHAPTER 5: WORKING WITH WORKFLOWS 129

Understanding Workflows 130
Initiating Workflows 130
Initiation Forms 130
Steps 131
Stages 131
Conditions and Actions 131
Loops 131
Workflow Associations 131
Creating Custom Workflow Solutions 132
Getting around the List of Workflows 132
Getting around the Workflow Settings 133
The Content Section 134
Editing Workflows 136
Conditions 138
Actions 140
Custom Ribbon Buttons 144
Variables and Parameters 144
Sending E-mails 151
Workflow Tasks and History 153
Tasks 153
Task Process Designer 154
History 158
Workflow Status 158
Workflow Information 158
Tasks 158
Workflow History 158
Summary 159

CHAPTER 6: WORKING WITH CONTENT TYPES 161

Content Types Overview 162
The Anatomy of a Content Type 164
Name and Description 164
Parent Content Type 164
Group 164
Template 165
Workflow 169

Site Columns 172
Document Information Panel Settings 175
Information Management Policies 178
Document Conversion 179
Base Content Types 179
Business Intelligence Content Types 179
Community Content Types 180
Digital Asset Content Types 180
Document Content Types 181
Document Set Content Types 181
Folder Content Types 185
Group Work Content Types 186
List Content Types 186
Page Layout Content Types 187
PerformancePoint Content Types 188
Publishing Content Types 189
Special Content Types 189
Managing Content Types 189
Enabling Content Type Management on a Library 190
Managing Multiple Content Types in a Library 191
Managing Content Types across Site Collections 192
Summary 194

CHAPTER 7: WORKING WITH WEB PARTS 197

Using Web Parts 197
Adding Web Parts to a Page 198
Configuring Web Parts 201
Removing Web Parts 205
Importing and Exporting Web Parts 205
Connecting Web Parts 207
The Out-of-the-Box Web Parts 209
List and Library 210
Blog 213
Business Data 213
Community 214
Content Rollup 215
Document Sets 221
Filters 221
Forms 222
Media and Content 222
Search 223

Search-Driven Content 223
Social Collaboration 224
Summary 225

CHAPTER 8: WORKING WITH SITES 227

Understanding Sites and Site Collections 227
Sites 228
Site Collections 228
Managing Site Collections and Sites 234
Navigation 235
Features 243
Managing Content and Structure 245
Managing Permissions 250
SharePoint Designer Settings 250
Help Settings 251
Popularity and Search Reports 252
Working with Content across Sites 253
Understanding SharePoint's Out-of-the-Box Templates 253
Collaboration Templates 253
Enterprise Templates 254
Publishing Templates 256
Creating Custom Templates 257
Saving a Site as a Template 257
Moving the Template to a New Location 260
Summary 260

CHAPTER 9: MANAGING PERMISSIONS 263

Understanding User Access and Audience Targeting 263
The Login Process 264
Active Directory Integration 266
Managing Access in SharePoint 267
SharePoint Permissions 267
SharePoint Groups 269
SharePoint Groups vs. Active Directory Domain Services Groups 274
Navigating the User Permissions Pages 275
Items That Can Have Permissions Applied 277
Site Permissions 277
List or Library Permissions 280
Item Permissions 281
Understanding the Share Option 284

Managing Permissions **286**
Information Bar 287
Check Permissions 288
Summary **288**

CHAPTER 10: WORKING WITH BUSINESS INTELLIGENCE **291**

Getting Started with Business Intelligence **291**
Working with Excel Services **293**
Creating a Business Intelligence Site Collection 294
Using the Excel Services Web Parts 299
Working with Parameters 304
Connecting to External Data Sources 307
Managing Permissions 307
Working with Visio Services **309**
Working with PerformancePoint Services **317**
Working with Reporting Services **318**
Working in a Report Library 320
Using Report Builder 3.0 332
Reporting Architecture 342
Working with the Report Viewer Web Part 350
Implementing Business Intelligence in Your Organization **351**
Understanding the Organization 351
Walking before You Run 351
Summary **352**

CHAPTER 11: WORKING WITH SOCIAL FEATURES **355**

Personalization Overview **355**
Engage People 356
Improve the Search Experience 356
Knowledge Mining 356
The Informal Organization 356
Understanding My Sites **356**
About Me 357
SkyDrive 361
Newsfeeds 363
Sites 366
Tagging and Note Boards **367**
Tagging 368

Tag Profiles 368
Note Boards 369
Managing Content Rating 371
Fostering Communities 373
The Community Portal 374
Categorizing Conversations 375
Holding Conversations 376
Managing Communities 378
Blogs and Wikis 380
Blogs 380
Wikis 380
Targeting Content to Audiences 381
Web Parts 381
Pages 381
Navigation Links 382
Promoted Sites 382
Publish Links to Office Client Applications 382
The Outlook Social Connector 383
Summary 384

CHAPTER 12: MANAGING FORMS 387

What Is InfoPath? 388
Creating and Customizing an InfoPath Form 389
Core Concepts 394
Page Design 395
Controls 395
Data Source 402
Views 403
Design Checker 404
Publish Form Template 405
Working with Form Templates 405
Designing a New Form 406
Publishing a Form Template to a Library 412
Customizing a Form Template 415
Advanced Form-Publishing Options 422
Working with Rules 426
Validation Rules 426
Formatting Rules 426
Action Rules 427
Summary 428

CHAPTER 13: WORKING WITH ACCESS SERVICES 431

Understanding Tables 433
Primary Key 433
Creating Tables 433
Working in Design View 435
Understanding Queries 443
Creating Queries 443
Creating Relationships 447
Understanding Forms 449
The Form Design Surface 449
Working with Controls 451
Working with Macros 455
Understanding Program Flow 455
Working with Actions 455
Data Macros 456
Macros in Action 458
Summary 461

CHAPTER 14: BRANDING AND THE USER EXPERIENCE 463

Why Organizations Brand 464
Best Practices for Enhancing the User Experience 464
Changing the Site Logo 465
Working with Themes 467
Tips for Success 470
When to Use Themes 471
Working with Master Pages 471
What Is the Design Manager? 471
What Is a Master Page? 472
Understanding the Relationship between Master Pages and Style Sheets 473
Best Practices for Branding SharePoint 474
Summary 481

CHAPTER 15: GETTING STARTED WITH WEB CONTENT MANAGEMENT 485

Web Content Management Overview 485
Working with Publishing Features 486
Creating a Publishing Portal 486
The Publishing Portal's Lists and Libraries 489

Working with Variations **491**
How Variations Work 491
Understanding Labels 493
Managing Translation Workflows 497
Working with Page Layouts and Content Types **502**
Enabling Publishing on a Team Site **509**
Advanced Publishing Concepts **510**
Cross-Site Publishing 510
Managed Navigation and Friendly URLs 512
Summary **514**

CHAPTER 16: MANAGING RECORDS **517**

Getting Started with Records Management **518**
Key Roles and Responsibilities 518
The File Plan 518
The Classification Plan 520
Implementing a Classification Plan **521**
Working with Managed Metadata 522
Configuring the Records Repository **529**
The Archive Approach 529
The In-Place Approach 537
Records Retention and Expiration **540**
eDiscovery and Holds **548**
Summary **554**

CHAPTER 17: WORKING WITH SEARCH **557**

Understanding SharePoint Search **557**
Key Terms 558
Basic Search 561
Building Search Queries 564
Search Center 566
Administering Search 568
Advanced Search 574
Managed Properties 576
Search-Driven Content **578**
eDiscovery **580**
Search Usage Reports **580**
Summary **582**

CHAPTER 18: BUILDING SOLUTIONS IN SHAREPOINT 585

Building Composite Solutions 585
Working with the Business 587
Identifying Reality 587
Planning for the Culture 588
Setting Realistic Goals 588
Understanding Your Audience 590
Communicating Effectively 590
Timing Your Solution Deployment 591
Planning for Multiple Scenarios 591
Gathering Requirements 592
Visual Mockups 592
Use-Case Scenarios 594
Development and Testing 594
How SharePoint Differs from Other Solutions 595
Guidelines for Testing 595
Planning User Adoption 595
Gauging User Adoption 595
Adapting along the Way 596
Think Big, Start Small, and Keep Growing 596
Summary 597

APPENDIX A: INSTALLING SHAREPOINT SERVER 2013 599

APPENDIX B: EXERCISE SOLUTIONS 605

INDEX 617

INTRODUCTION

MICROSOFT SHAREPOINT SERVER 2013 has improved and changed dramatically over previous versions of the product, including significant enhancements to the web content management, social media, business connectivity, and search features of the platform. However, the value of this tool to an enterprise depends primarily on the ability of individuals in the organization to understand the features and capabilities of the platform and effectively map those to specific business requirements.

This book is designed to mentor and coach an organization's business and technical thought leaders on the use and configuration of SharePoint to address critical information-management problems. It gives detailed descriptions and illustrations of the product's functionality and includes realistic usage scenarios to provide contextual relevance and a personalized learning experience.

WHO THIS BOOK IS FOR

The mission of this book is to provide extensive knowledge to information workers and site managers that will empower them to become SharePoint application champions in their organizations. This book should be the premier handbook of any active or aspiring SharePoint expert.

To complete the exercises (known as *Try It Outs*) in this book, you should have a basic comfort level using Microsoft Office client applications to create content and a general understanding of how to interact with a website through the browser. This book is intended as a starting point for any SharePoint 2013 user, whether that user has never used SharePoint before or has some familiarity with a previous version and just wants to understand the differences with the new release.

WHAT THIS BOOK COVERS

SharePoint 2013 represents the latest release of Microsoft's portal and collaborative technology platform. This book covers in detail many of the features of Microsoft SharePoint Server 2013 that will assist you in creating an effective collaboration, content management, business intelligence, business process, or social media solution for your organization. It addresses core functionality that has existed in SharePoint within previous versions as well as new concepts that have been introduced in this latest release.

HOW THIS BOOK IS STRUCTURED

This book covers the essential elements of using and configuring SharePoint 2013 as an effective tool for business. Each chapter focuses on a dedicated topic and provides hands-on exercises to assist with your learning experience. The following is a short summary of each chapter of this book.

- **Chapter 1, "Understanding SharePoint":** This chapter serves as an introduction to SharePoint and lays the foundation for important terminology and concepts explored in the following chapters.
- **Chapter 2, "Working with List Apps":** This chapter introduces one of the core mechanisms for sharing and organizing content in a SharePoint site. You will review what list apps are and how they are used, and then explore the various types that exist in SharePoint 2013.
- **Chapter 3, "Working with Library Apps":** After reviewing some of the fundamental concepts relating to lists, this chapter introduces the other major storage mechanism in SharePoint, known as libraries. This chapter discusses some of the various apps that exist for libraries.
- **Chapter 4, "Managing and Customizing Lists and Libraries":** SharePoint apps for lists and libraries provide a great starting point for collaboration and information sharing. This chapter shows how you can extend these base templates to address an organization's specific requirements for a collaborative site or information management tool.
- **Chapter 5, "Working with Workflows":** This chapter discusses the templates that SharePoint provides for workflows and demonstrates how to create custom workflow solutions using the SharePoint Designer application.
- **Chapter 6, "Working with Content Types":** Most organizations have documents that use consistent templates, processes, and policies each time they are created. Therefore, SharePoint has content types, which allow an organization to package templates and information to ensure that reusable components are rolled out in the organization to enforce consistency and ease of use. This chapter demonstrates what content types are and explores how they can be used through some hands-on examples.
- **Chapter 7, "Working with Web Parts":** Web parts are an important element in SharePoint because they enable teams to present information on their sites to users in many different ways. This chapter explores the various groups of Web Parts that exist in SharePoint 2013, and gives examples on how specific types of Web Parts can be configured and used to present information in a desired manner.
- **Chapter 8, "Working with Sites":** The fundamental components of any SharePoint environment are its sites and workspaces. These collaborative work areas contain all the components discussed in previous chapters and represent how each of those items comes together to provide an effective environment for collaboration, communication, and document management. In this chapter, topics such as site templates and features are covered.
- **Chapter 9, "Managing Permissions":** Effective management of users is of ultimate importance to any information system. The two primary tiers of effective user management are securing content and personalizing information on the portal. This chapter explains in simple terms how to effectively secure a SharePoint environment at the site level, the list or library level, and down to the unique content items stored on a SharePoint site. In addition,

the chapter introduces personalization to ensure that readers understand how to effectively target information to users in a portal.

- **Chapter 10, "Working with Business Intelligence":** This chapter demonstrates how to improve the overall decision making of an organization, including providing access to important information, using browser-based worksheets and visual indicators of performance information, and building personalized, interactive dashboards.
- **Chapter 11, "Working with Social Features":** Social networking has been an area of major enhancement in SharePoint 2013. In this chapter, you will learn how to make the most of SharePoint's social networking, such as My Sites, tags, blogs, wikis, and ratings.
- **Chapter 12, "Managing Forms":** Microsoft InfoPath is the ideal companion to SharePoint for many business solutions. This chapter introduces readers to creating simple business applications using Microsoft InfoPath, including creating template parts, creating flexible form interfaces, and connecting to business data.
- **Chapter 13, "Working with Access Services":** This chapter provides an overview of the new and simplified Access application model in SharePoint 2013, which empowers users to create Access applications that leverage SharePoint 2013 as the front end.
- **Chapter 14, "Branding and the User Experience":** SharePoint 2013 offers a significantly improved experience for changing the look and feel of your site. In this chapter we will take a look at some of these enhancements, including the Design Manager and an improved mobile experience through channels.
- **Chapter 15, "Getting Started with Web Content Management":** This chapter provides an overview of the web content management capabilities of the system, including the use of publishing sites and features, the automatic provisioning of multilingual content through variations, and the creation of custom page templates known as *page layouts*.
- **Chapter 16, "Managing Records":** This chapter provides an overview of and introduction to the establishment of a records management practice in your organization using SharePoint 2013. The chapter covers topics including term sets, archive-based records management features, as well as in-place records management features.
- **Chapter 17, "Working with Search":** An information system is useful to an organization only if stakeholders can easily access and locate the information it contains. This chapter discusses the search engine capabilities of the SharePoint platform, including methods that improve the search experience through the use of effective queries, configurations, and analytics.
- **Chapter 18, "Building Solutions in SharePoint":** This chapter explores the practical usage of SharePoint 2013, exploring realistic scenarios that leverage SharePoint features to perform critical business functions.

WHAT YOU NEED TO USE THIS BOOK

To complete the examples in this book effectively, you should have access to a Microsoft SharePoint Server 2013 environment or site collection, and have administrative rights to the server. If you do not have administrative rights, your server administrator may have to assist you with some exercises in this book.

You should also have a client computer running either Windows 7 or Windows 8 along with Microsoft Office 2013 Professional or Professional Plus, and SharePoint Designer 2013. Although many exercises can be completed with earlier versions of Office, certain exercises may function better with Office 2013.

The resource files for the samples is available for download from the Wrox website at:

```
www.wrox.com/remtitle.cgi?isbn=1118495896
```

CONVENTIONS

To help you get the most from the text and keep track of what's happening, we've used a number of conventions throughout the book.

TRY IT OUT

The *Try It Out* is an exercise you should work through, following the text in the book.

1. They usually consist of a set of steps.
2. Each step has a number.
3. Follow the steps through with your copy of the database.

How It Works

After each *Try It Out*, the code you've typed will be explained in detail.

> ***WARNING*** *Warnings hold important, not-to-be-forgotten information that is directly relevant to the surrounding text.*

> ***NOTE*** *Notes indicate notes, tips, hints, tricks, and asides to the current discussion.*